PICKLER
WEALTH ADVISORS

20th Anniversary

PICKLER
WEALTH ADVISORS

OUR FAMILY DELIVERING SOLUTIONS FOR YOUR FAMILY.

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PICKLER
WEALTH ADVISORS

FROM WALL STREET TO MAIN STREET

Pickler Wealth Advisors is an award-winning independent firm dedicated to empowering your dreams. We bring the resources of **Wall Street to Main Street**, creating a plan for you that is personal, relevant, and achievable.

We pride ourselves on advisory excellence, assembling the appropriate tools to provide you with what we believe is the best advice and counsel. We understand the complexities associated with managing finances and are here to guide you every step of the way. Because of our partnership with The Pickler Law Firm and Pickler Accounting Advisors, we deliver solutions and bring actionable steps to make your plan work.

Small Town Values make us who we are. We believe in community and invest in you as a valued member of our family — not just as another client.

As your trusted advisor, we partner with you to navigate through life's challenges and obstacles to pursue your goals. We prepare you for the future.

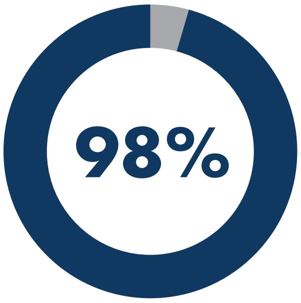
Our job is to understand what's important to you, develop a roadmap to get you there, and turn your vision into a reality. We are committed to excellence in client service and only consider ourselves successful when we are viewed as significant in your life.

The Pickler Law Firm, LLC, Pickler Accounting Advisors, PLLC, and Commonwealth Financial Network are separate and unrelated entities.

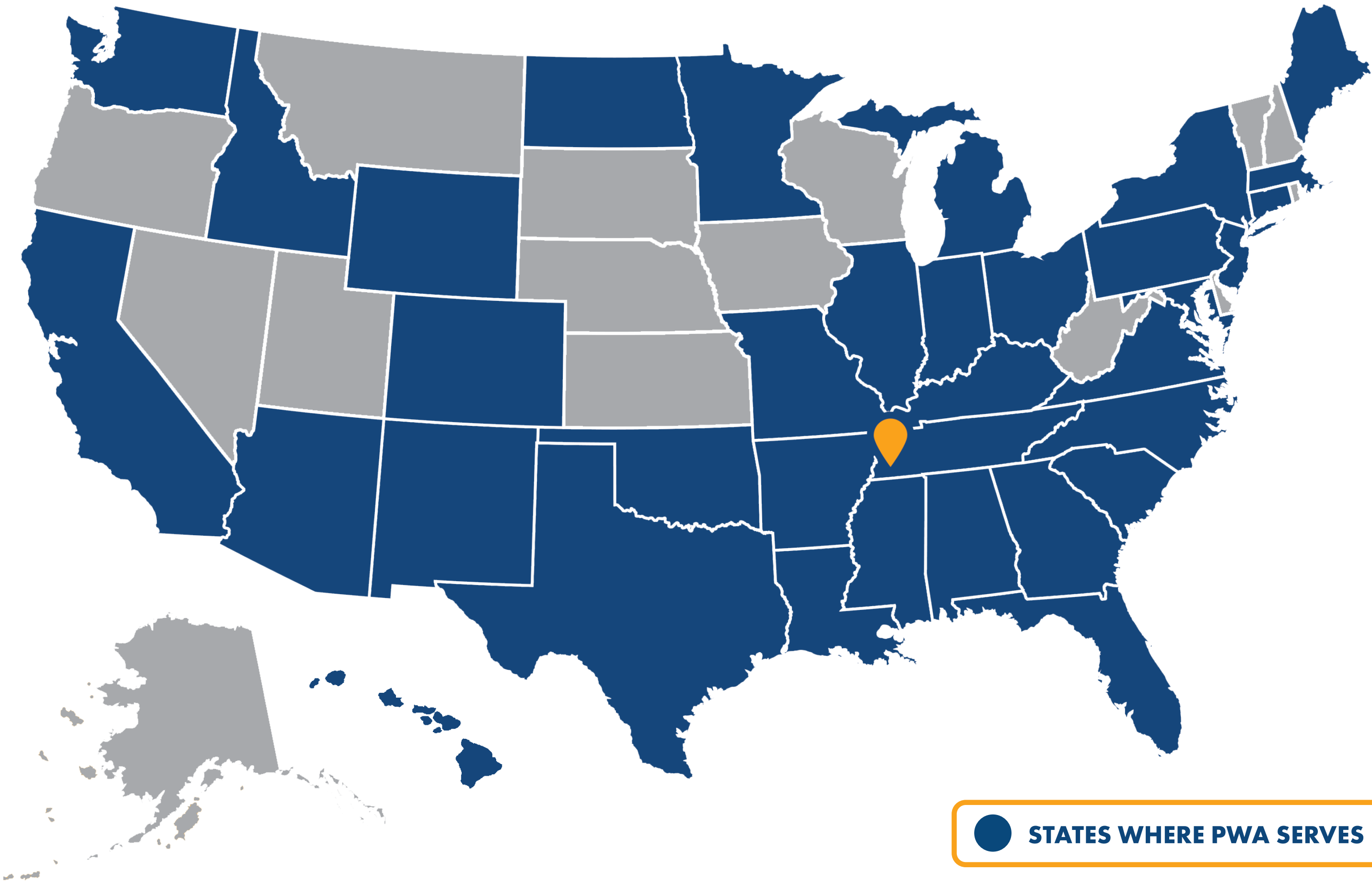
A NATIONAL FIRM WITH LOCAL VALUES

Pickler Wealth Advisors has served clients across the country since 2005, and has garnered national acclaim. Led by David Pickler, PWA continues to grow — not only because of our dedicated team of professionals — but because of clients like you. Take a glance at some of our statistics to help you better understand our reach, services, and capabilities.

CLIENT RETENTION RATE*



1,000+	**35**	**589M**	**20**
CLIENTS SERVED	STATES SERVED	ASSETS UNDER ADVISEMENT**	YEARS IN BUSINESS



STATES WHERE PWA SERVES

*As of December 31, 2023. Client retention rate represents percentage of clients retained over 2023.
**Assets Under Advisement (AUA) based off of data from March 3, 2025.

THE CORE VALUES OF PWA

Pickler Wealth Advisors holds fast to the belief that maintaining a **clear set of values** is an important piece of the advisor/client relationship. Above all, we value accountability, transparency, and consistency in everything that we do.

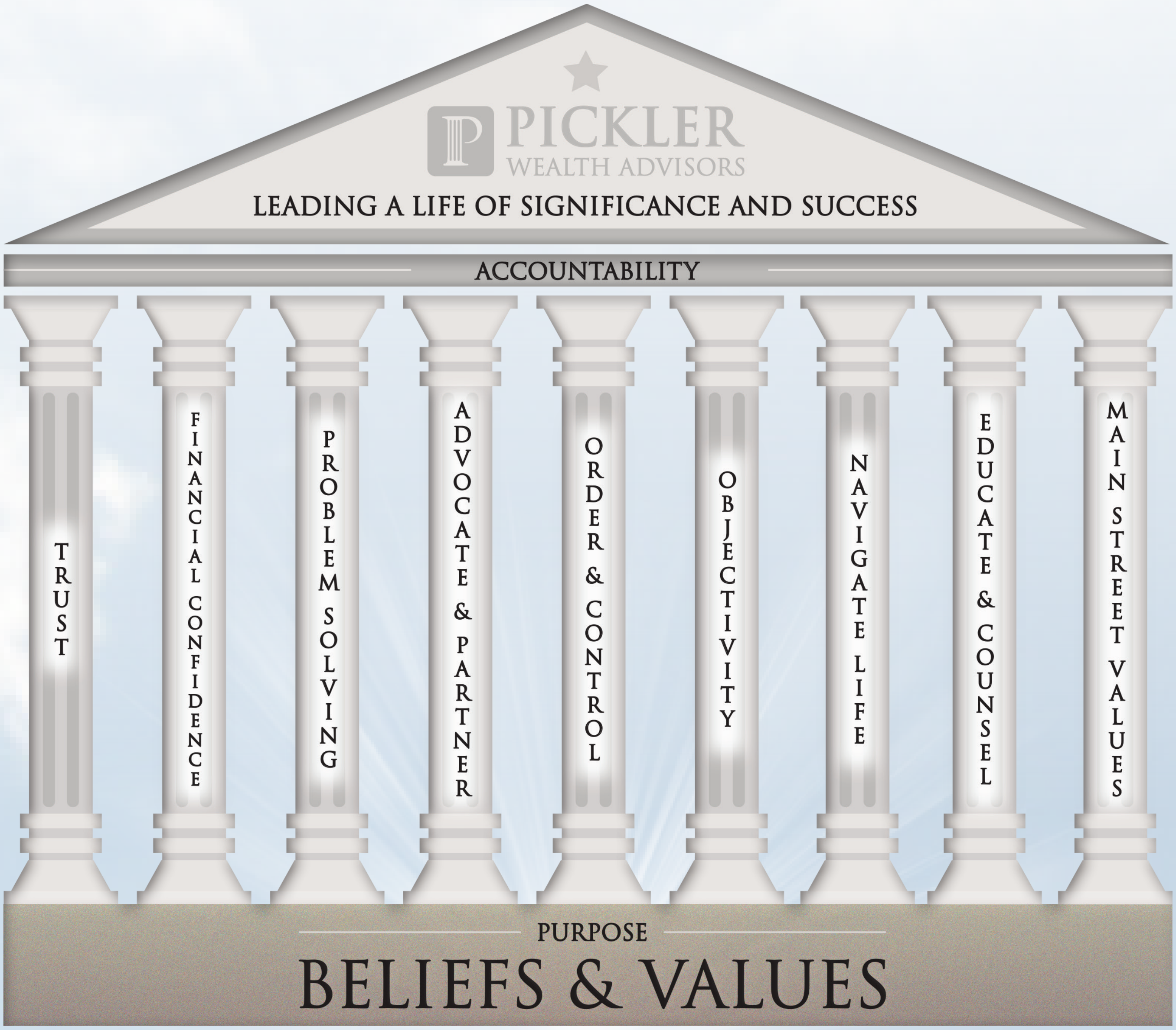
COMMITMENT CREED: OUR PROMISE TO YOU

- We define success as being **significant** in the lives of the clients we serve and the communities in which we live.
- We **make a difference** in the lives of our clients. We celebrate their achievements and support them in the times of challenge and adversity, helping them navigate through life's turbulent waters.
- We **empower** our clients' dreams.

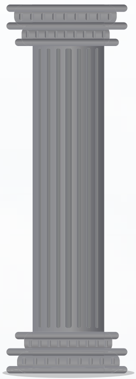
PILLARS OF PURPOSE

STRIVING FOR EXCELLENCE IN ALL THAT WE DO.

Pickler Wealth Advisors is built upon nine pillars that support our firm. These pillars represent our **essential principles** — they define how we deliver solutions for you. These pillars establish the foundation that supports our commitment to accountability, **empowering our clients to lead a life of success and significance**.



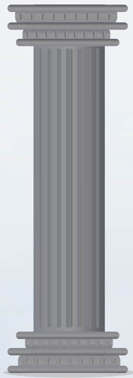
PILLARS OF PURPOSE: THE PWA DIFFERENCE



1. TRUST

We believe in doing the right thing for the right reason. We place the interests of clients before our own and approach every aspect of our relationship with honesty, consistency, and integrity. **Trust is earned**. We take this to heart by remaining transparent in our processes. We are committed to "walking the walk" and being there when you need us the most, serving as your enduring ally.

2. FINANCIAL CONFIDENCE



Everyone has fear of the unknown. When people are confronted with a challenge, comfort comes when they can see a light at the end of the tunnel. **It is our job to shine that light and serve as a beacon of hope**. We are more than your advisor. We are your partner. We take the time to get to know you — who you are and what's important to you — so that we can provide objective advice and counsel. **Our goal is to provide you freedom from anxiety**.

3. PROBLEM SOLVING

Problem solving is **more than making a plan** — it's about adjusting the plan when life happens. As your Trusted Advisor, we will be by your side, identifying solutions to today's problems to help achieve a sound future for you and your family. When you call us, you will connect with a caring professional who understands you on a personal level. **We are always here for you and make *your* problems our priority**.

PILLARS OF PURPOSE: THE PWA DIFFERENCE

4. ADVOCATE & PARTNER

Our role is to passionately serve your interests, advocating for you as a trusted confidant, while helping you achieve your dreams. We support you in the pursuit of your goals and fight for you through adversity. Pickler Wealth Advisors remains focused and passionate about delivering solutions for you and your family.

5. ORDER & CONTROL

A commitment to bring **order from chaos** is the cornerstone of our nine pillars. We take all of the elements of your life and design a cohesive, comprehensive plan of action. Our job is to create a blueprint for success. Working with Pickler Wealth Advisors **empowers you to take control** of your life, goals, finances, and future.

6. OBJECTIVITY

Our process begins with us getting to know our clients on a deeper level. **We invest our time before we invest your money**. By inviting us into your life, you entrust us with valuable information and empower us to give you our impartial advice and counsel. Fully understanding your circumstances provides us the ability to deliver objective, educated opinions and solutions to your life's challenges.

PILLARS OF PURPOSE: THE PWA DIFFERENCE

7. NAVIGATE LIFE

Life happens. As former boxing champion Mike Tyson once said, "everyone has a plan until they get punched in the mouth." The strength of Pickler Wealth Advisors is in our ability to pivot in times of volatility or uncertainty, making sure your plan is always relevant. After all, **those who adapt are the most able to survive**.

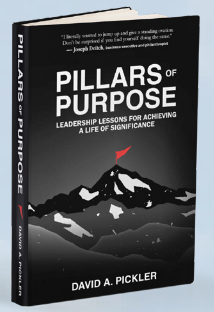
8. EDUCATE & COUNSEL

Educating our clients is more than helping them understand investments. It's about **empowering clients to make the best choices while enriching their lives**. We are here to provide practical knowledge, help you understand what questions to ask, and how goals can be met. Whether it be a personal conversation on how to overcome an obstacle or providing a workshop on new tax laws, we are here to confidently guide you every step of the way.

9. MAIN STREET VALUES

People want to do business with people with whom they can connect. They want a sense of camaraderie and family. They aspire to belong. It's this **human desire to connect** that drives our firm to serve as an anchor in our community. The strength of America is in our communities. This commitment to community is the foundation upon which we build lasting relationships with you and your family. From Wall Street to Main Street, **our family delivers solutions for your family**.

PILLARS OF PURPOSE



In *Pillars of Purpose*, David Pickler takes readers on a journey of self-discovery. In the book, David shares his personal experiences and the stories of others who have continually strived to live a life of significance. Throughout this thought-provoking book, he provides suggestions to help you achieve your goals and to become a powerful force for bettering the lives of others.

www.pillarsofpurpose.com

Pillars of Purpose and Commonwealth Financial Network are separate and unrelated entities.

OUR COMMITMENT TO CLIENT SERVICE

We believe a client relationship should be started and maintained through **stewardship**, not salesmanship. It doesn't matter how much you have invested with us, we put the same amount of care into each client relationship, treating you as our sole priority. We believe this philosophy has attributed to our client retention rate and client referrals — something we will never take for granted.

WHEN THE GOING GETS TOUGH, WE'RE HERE FOR YOU.

We understand that life is not always smooth sailing, and it can cause anxiety when planning for your future. That's where Pickler Wealth Advisors comes in. **We serve as your lighthouse in the storm** and work even harder for you when the going gets tough. Walking alongside you, we help you navigate the ups and downs and communicate every step of the way. **That's the Pickler Promise**.

Consider Pickler Wealth Advisors as an extension of yourself and your family. We communicate *for* you to our team, always staying proactive in caring for you and your investments. We build a **personal, lifelong relationship** with each of our clients, taking time to understand their unique situations. We help to ensure goals can be accomplished by providing objectivity, professional counsel, and financial confidence.

COMMUNICATION IS KEY

YOUR TRUSTED PARTNER ON LIFE'S JOURNEY

At Pickler Wealth Advisors, **staying informed is effortless**. With our team always on call, you get expert support when you need it. And with our various channels of communication, we simplify financial complexities, delivering wisdom in clear, actionable insights.

BULLCAST

Tune in to **BullCast**, our award-winning* podcast that delivers real talk while making financial topics more accessible. Each week, co-hosts Katie Pickler, Cort Winsett, and Cameron Spann break down personal finance into engaging, bite-sized topics. Join them as they bring a basic level of awareness in a relatable, honest, and pop-culture-fueled format. www.bullcastpodcast.com

BULLTALK

Dial in to **BullTalk**, our weekly market call hosted by David Pickler, and engage in a post-call Q&A session. BullTalk gives listeners an engaging look into the most recent economic trends as well as early market conditions. www.picklerwealthadvisors.com/bull-talk

BULLTV

Watch our talkshow, **BullTV**. Hosted by David Pickler and produced by the students of Collierville High School, this monthly show empowers, educates, and entertains while highlighting the citizens of the Mid-South who inspire and deliver solutions for a stronger community. www.bulltv.show

BULLETS

Join us every month for **Bullets**, Pickler Wealth Advisors' monthly market update video. Tune in as David Pickler breaks down the major economic and political activities happening in our world. No frills. No jargon. Just the facts. www.picklerwealthadvisors.com/bullets

2024 AVA Digital Award for short film, Created by AVA Awards. This award recognizes outstanding work by creative professionals involved in the concept, direction, design, and production of media that is part of the evolution of digital communication and is not specific to financial services and does not imply an endorsement, recommendation, or otherwise reflect the performance of the advisor. Go to https://avaawards.com/ for more information.

***2024 VOX Awards (Tactics - Podcasts)**, created by The Public Relations Society of America (PRSA) Memphis Chapter. This award is based on contributions through strategic campaigns, organizational excellence, and innovative tactics and is not specific to financial services and does not imply an endorsement, recommendation, or reflect the performance of the advisor. Go to https://prsamemphis.org/blog/voxawards2024 for more information.

2023 ThinkAdvisor LUMINARIES Awards Finalist, created by ThinkAdvisor. Presented in July 2023 for the preceding 12 months. Not indicative of firm's future performance. Your experience may vary. For more information, please visit https://tinyurl.com/r3r3cezn.

COMMUNICATION IS KEY

WEEKLY
MARKET
UPDATE

On a weekly basis, we electronically distribute our **Weekly Market Update** — a robust document that breaks down the current market into easy-to-digest pieces. This Update distills important information for our clients including "General Market News," "Market Index Performance Data," and "What to Look Forward to."

Exclusive Access to Events

We are passionate about **creating events that enrich the lives of the clients** and communities we serve. On a monthly basis, we host celebrations, workshops, and galas which bring people together. Whether it be our *Valentine's Day Ladies Luncheon* where we celebrate our female clients, our *Authentic Italian Wine Tasting Experience*, or our *Jingles & Jazz Holiday Open House*, we're confident you will find an event to fit your lifestyle.

State-of-the-Firm Letter

At the beginning of each year, our firm mails out David Pickler's **State-of-the-Firm Letter** to every client. This communiqué serves as an annual message that informs you of what is happening at Pickler Wealth Advisors. It also states David's predictions on what to expect in the following months when it comes to the economy and markets. We believe this letter is a perfect way to stay transparent with our clients while also keeping in touch.

MY TWO CENTS
A NEWSLETTER
by David Pickler

Every Tuesday, David Pickler sends out **My Two Cents**, a weekly e-newsletter that captures his thoughts on current events. Subscribe to *My Two Cents* to get a better picture of our world through interesting articles, pictures, videos, and more!

BULLCAST | BULLTALK | BULLTV | BULLETS

Discover all of this engaging content plus more at www.picklerwealthadvisors.com/communication

THE PICKLER PROCESS

Pickler Wealth Advisors provides **goals-based wealth management**, personalized advice, and intellectual capital to help solve your problems.

STEP 1 UNDERSTAND

You have unique passions and goals, and Pickler Wealth Advisors is committed to learning about you and what is important to you and your family.

We want to **develop a clear understanding** of your family, your interests, and your passions because that helps us create a customized wealth management solution that will help you achieve your life goals.

- We send our Confidential Client Profile
- Initial Client Consultation
- Data gathering for planning reviews

STEP 2 ANALYZE

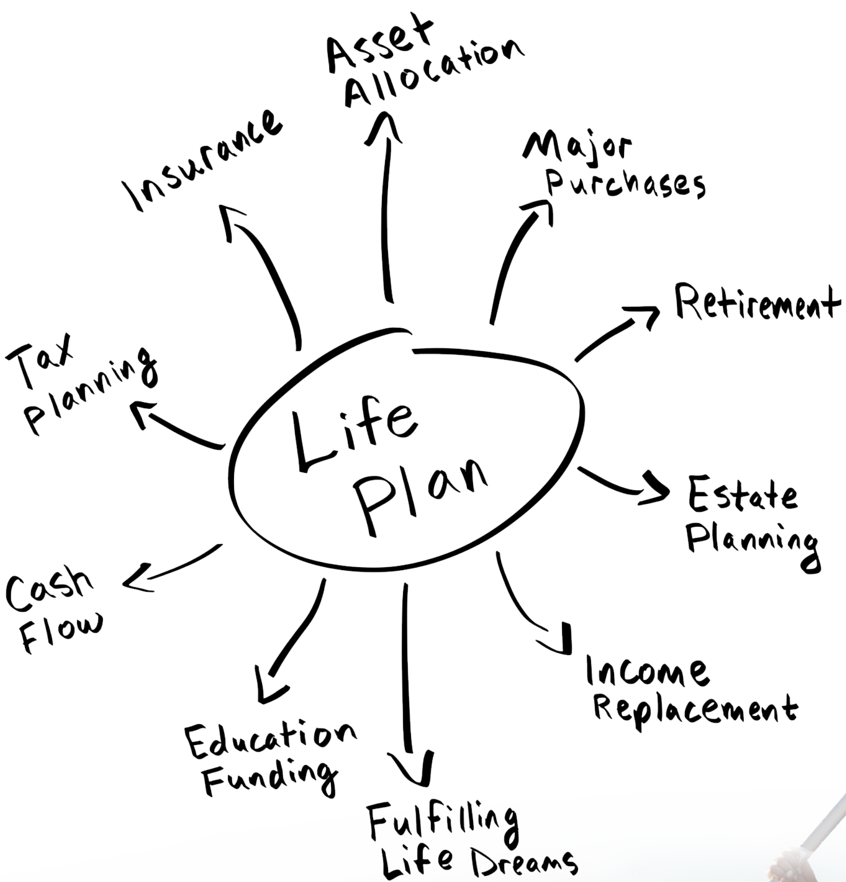
It is important for us to establish a deep understanding of your current circumstances as well as your goals and dreams for the future. **This process will empower you to more clearly identify personal and financial goals** including retirement objectives, education funding, tax planning, and developing your own bucket list.

- Initial assessment and analysis of data
- Formulate goals and objectives

THE PICKLER PROCESS

STEP 3 PLAN

We have comprehensive planning tools that allow us to use your personal financial data and our understanding of your needs to **design a customized plan for you**. We will build a plan that places your assets in investment vehicles that will best achieve your goals. A successful plan will also provide for a successful transfer of your wealth. Your plan will include estate planning recommendations, life insurance needs analysis, and estate tax planning. We provide solutions that include business succession planning, family trusts for transfer of your assets, and charitable gifting wishes.



Financial planning is at the heart of what we do. It is not something that is done once and then never considered again. Financial planning is a process that continuously revolves around you, the client. The ultimate product of this process is a **Life Plan** that takes into account a broad array of considerations that may not have even occurred to you.

- Planning presentation
- Implementation plan

THE PICKLER PROCESS

STEP 4 IMPLEMENT

Your plan will **incorporate specific strategies** that will be integral to converting your plan design into action. The implementation of the plan is the technical aspect of the process. In this stage, we handle all of the moving parts involved in actually getting your money working for you.

We will be responsible for setting up your new account(s), and will request a transfer of your existing assets into your new account(s). If it is part of your plan, we will facilitate the development of an estate plan and tax strategies, and will also help you obtain appropriate insurance.

- Decision point: would you like to move forward with the plan?
- Implementation of approved steps
- Execution of the Wealth Management Proposal
- Baseline Account Review

STEP 5 MONITOR

Perhaps the most important part of our advisory process is a **commitment to ongoing monitoring, review, and communications**. As your life and markets change, so too must your plans. Our disciplined process of systematic review will provide the greatest opportunity for planning success and achieving your goals.

Our model depends upon our ability to observe your progress and track your growth or lack thereof, so we will meet with you immediately after investing your assets to establish the baseline for all your future account reviews, and then we will meet with you every year thereafter to review your progress.

You will receive regular statements of your accounts and, should you have questions, you will have considerable access to us for answers. Meanwhile, if you have any changes in your life that might affect your plan, we will rely on you to notify us so that we can analyze your new circumstances and determine if changes to your plan are called for.

- Systematic and ongoing review of your plan
- Update and review of Financial Plan Analysis and Estate Plan
- Client coordinate with administrators
- Access to technology and communications

SERVICES WE OFFER

Our client-focused process is tailored to help individuals set financial goals, develop a financial road map, and implement the appropriate financial tools and strategies.

Life Planning

A Life Plan is a strategy to help you reach your goals. Through data gathering and analysis, we guide you to financial comfort during your life while allowing for the efficient transfer of assets to your heirs.

Portfolio Management

Although investors must be willing to bear risk in order to achieve an expected return, our main goal is to help our clients manage financial risk through sound planning and financial control.

Strategic Asset Allocation

Strategic asset allocation is the process of dividing your investment dollars among a variety of complementary asset classes, such as stocks; bonds; real estate; and short-term, highly liquid vehicles so that your portfolio is well diversified.

Income Strategies

We develop optimized strategies to match your income needs with available assets and resources to help maximize tax efficiency and find opportunities for creating lifetime cash flow.

Estate Management

Estate management is the process of creating a master plan for the management of property during life and the distribution of that property at death. Done correctly, estate management should give you more control over your assets.

Tax Planning

Unplanned financial transactions can result in recurring tax fees or large tax penalties, so we take into account the potential tax consequences of the financial decisions we make together.

Insurance Needs Analysis

How do you decide between permanent and term life insurance? Which policies carry risk and which are guaranteed? Which policy will cost most? We are here to guide you through the confusion and select a plan that works best for you.

Family Wealth & Estate Planning

Our role in counseling multigenerational families on the transfer of wealth is twofold: (1) To guide existing clients on the most tax-advantaged ways to pass along wealth in line with their current goals. (2) To educate the younger generations on the potential for sudden windfalls and on how to be prepared ahead of time.

VALUE-ADDED SERVICES

We offer a suite of financial, legal, and planning services, empowering you to achieve your goals. Our firms believe that when you invest in your community, you improve the lives and businesses around you.

The Pickler Law Firm is dedicated to providing outstanding legal advocacy and superior client service. Our experienced professionals offer legal excellence in comprehensive estate planning, probate administration, family law, civil dispute resolution, and corporate law. The law firm specializes in financial, legal and risk management, as well as strategies to protect client's assets and ensure maximum tax efficiency. *5x Winner, "Best Law Firm in Memphis" (2019-2023).*

Pickler Accounting Advisors was founded in 2012 and merged with **Robert Kin Campbell, CPA** in 2020. With over 100 years of experience in the tax field, the team is dedicated to both the clients and community. The accounting firms in Collierville, TN and Russellville, AR offer many services including tax preparation, software implementation, IRS issue resolution, and bookkeeping work.

Pickler Events believes "it's all in the details." As a premier event planning and coordination service in the Mid-South, we help make your dreams a reality. Whether it be a fairy-tale wedding, an intimate networking event, or a grand fund-raising gala, we are here to bring your next event to life!

The Pickler Law Firm, LLC, Pickler Accounting Advisors, PLLC, Pickler Events, and Commonwealth Financial Network are separate and unrelated entities.

RECOGNITIONS & ACCOLADES

Pickler Wealth Advisors is an **award-winning independent wealth advisory firm**, and has been recognized as an industry leader both locally and nationally. In 2024, David was named Top Advisor* by *InvestmentNews* and was also named to *Forbes'* Best-In-State Wealth Advisors list**. He has twice been named a Charitable Champion*** by *Invest in Others*, and, in 2019, was the recipient of their Catalyst Award**** for his charitable work. In 2021, Pickler Wealth Advisors was named Small Business of the Year***** by *Memphis Business Journal* and, in the same year, was named to the *Inc. 5000* list of America's Fastest-Growing Private Companies******.

But more than hard facts, measurements, and criteria, consider the people with whom you might work. David Pickler has built his personal and professional life on the principles of **community service, civic leadership, and philanthropic investment**. He has been a long-time advocate of public education and has dedicated much of his life to its improvement. His non-profit foundation, APEF, focuses on financial literacy, workforce development, and innovation.

__2024 InvestmentNews Top Advisors__, created by InvestmentNews. Presented in January 2024 based on data gathered from September 2022-September 2023. 113 advisors were considered, 60 advisors were recognized. Advisors pay a fee to hold out marketing materials. Not indicative of advisor's future performance. Your experience may vary. See https://www.picklerwealthadvisors.com/recognitions-and-accolades for more information.

*****2024 Forbes Best In State Wealth Advisors**, created by SHOOK Research. Presented in April 2024 based on data gathered from June 2022 to June 2023. 23,876 were considered, 8,507 advisors were recognized. Not indicative of advisor's future performance. Your experience may vary. See https://www.picklerwealthadvisors.com/recognitions-and-accolades for more information.*

****2024 Invest in Others Charitable Champions List**, created by Invest in Others Charitable Foundation. This award is based on leadership in corporate philanthropy and is not specific to financial services and does not imply an endorsement, recommendation, or reflect the performance of the advisor. See https://www.picklerwealthadvisors.com/recognitions-and-accolades for more information.

*****2019, IiO Catalyst Award**, created by Invest in Others. This award is based on financial professional's charitable works and not specific to financial services and does not imply an endorsement, recommendation, or otherwise reflect the performance of the advisor. See https://www.picklerwealthadvisors.com/recognitions-and-accolades for more information.

******2021 MBJ Small Business Awards**, created by the Memphis Business Journal. This award is based on Memphis small businesses on the rise and not specific to financial services and does not imply an endorsement, recommendation, or otherwise reflect the performance of the advisor. See https://www.picklerwealthadvisors.com/recognitions-and-accolades for more information.

*******2021 Inc. 500 America's Fast-Growing Private Companies**, created by Inc. Magazine. This award is based on being one of the nation's fastest-growing private companies and not specific to financial services and does not imply an endorsement, recommendation, or otherwise reflect the performance of the advisor. See https://www.picklerwealthadvisors.com/recognitions-and-accolades for more information.

2015 Financial Times 400 Top Financial Advisors, created by Ignites Research. Presented in March 2015 for the past 12 months. 1,500 Advisors were considered, 400 Advisors were recognized. Advisors pay a fee to hold out marketing materials. Not indicative of advisor's future performance. Your experience may vary. See https://www.picklerwealthadvisors.com/recognitions-and-accolades for more information.

2024 AdvisorHub Advisors to Watch (Solo Advisors), created by AdvisorHub. Presented in 06/20/24, based on data as of 12/31/22 - 12/31/23. 1,987 advisors were considered, and 1,000 advisors were recognized. Advisors were ranked and then sorted into their respective categories. Advisors do not pay a fee to be considered. Not indicative of advisor's future performance or the quality of investment advice. Your experience may vary. See https://www.picklerwealthadvisors.com/recognitions-and-accolades for more information..

INVESTING IN OUR COMMUNITY

ENGAGED PHILANTHROPY

The Pickler Companies family of firms believes in the power of paying it forward with passion and purpose. This laser-focused mission of giving back is the common thread that runs through everything we do. It is an essential element of our culture. We are always working to better the lives of our clients and community, not only finding impactful solutions for those in need, but also making the world a better place. It's not about personal gain but, rather, *dynamic altruism.*

We call this enriched giving philosophy **Engaged Philanthropy**, and by being engaged, we "fill our buckets" each and every day. Engaged Philanthropy is more than writing checks – it's about community engagement and presence. This thoughtful process entails collaborating with outside organizations to maximize their reach, impact, and success. Whether that means joining a local board to share our voice or spearheading a capital campaign to raise crucial funds for a non-profit, Pickler Companies moves the needle through the lens of compassionate leadership.

Explore more at www.picklerwealthadvisors.com/engaged-philanthropy

APEF

COLLIERVILLE SCHOOLS

GERMANTOWN MUNICIPAL SCHOOL DISTRICT

Shelby County Schools

TENNESSEE BUSINESS ROUNDTABLE

PORTER-LEATH

ORPHEUM theatre group

Chickasaw Council Boy Scouts of America

Memphis Oral School for the Deaf

nsba National School Boards Association

TSBA Tennessee School Boards Association

Team of Dreams Iowa

COMMUNITY SERVICE IS THE HEART OF PWA

Pickler Wealth Advisors was founded on the principle that success is only achieved when we are viewed as significant in the lives of the clients and communities we serve.

BIOGRAPHY OF DAVID PICKLER

David A. Pickler, Esq., CFP®, ChFC®, CDFA®, CPWA®, CPFA, CTEP, CAP®

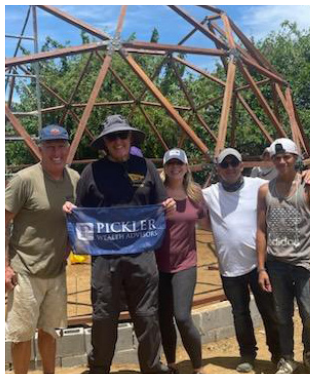
President & CEO

David began his career in the investment business over 40 years ago. He graduated Magna Cum Laude from Arkansas State University with a Bachelor of Science in Business Management degree in 1980 and from Cecil C. Humphreys School of Law, University of Memphis, with Juris Doctor Degree in 1985. He was admitted to the Tennessee Bar in 1986 and maintains an active practice emphasizing Tax and Estate Planning. He is a CERTIFIED FINANCIAL PLANNER™ professional, a CERTIFIED PRIVATE WEALTH ADVISOR®, a Chartered Financial Consultant (ChFC®), a Certified Divorce Financial Analyst® practitioner, a Certified Plan Fiduciary Advisor, a Chartered Trust and Estate Planner, a Chartered Advisor in Philanthropy, a Rule 31 Mediator, and an Accredited Estate Planner.

As an award-winning wealth advisor and attorney, David serves as President and CEO of Pickler Wealth Advisors, The Pickler Law Firm, and Co-Founder of Pickler Accounting Advisors in Collierville, Tennessee. He is also the Founder and Executive Director of APEF. David has built his personal and professional life on the principles of civic leadership, public education advocacy, and philanthropic investment.

David was a member of the first-elected Shelby County Board of Education, having been elected in 1998. He served on the Board for 16 years and was the School Board Chairman for 12 years, from 1999-2011. David also served as President of the Tennessee School Boards Association, and in 2013 became the President of the National School Boards Association. Upon his retirement from elected office, David founded APEF to serve the interest of America's public-school children in two key areas: financial literacy and workforce development.

David is the author of *Pillars of Purpose: Leadership Lessons for Achieving a Life of Significance*, a collection of personal stories that lay out a detailed, step-by-step process of how to build a life of significance. *Read more about David's awards the firm's accolades on page 16*.



MEET THE PWA TEAM

David A. Pickler, Esq., CFP®, CPWA®, ChFC®

President & CEO

dpickler@picklerwealthadvisors.com

O: 901.316.0160, Ext. 1150 | C: 901.494.5821

www.PicklerWealthAdvisors.com/David

Katie Pickler, MS, MPAS®, CSRIC®

Vice President

kpickler@picklerwealthadvisors.com

O: 901.316.0160, Ext. 1168

www.PicklerWealthAdvisors.com/Katie

Anne Borst

Portfolio Reporting Coordinator

aedmiston@picklerwealthadvisors.com

O: 901.316.0160, Ext. 1161

www.PicklerWealthAdvisors.com/Anne

Melissa Skovdal

Sr. Client Services Administrator

mskovdal@picklerwealthadvisors.com

O: 901.316.0160, Ext. 1156

www.PicklerWealthAdvisors.com/Melissa

Shelby Butterfield

Client Services Administrator

sbutterfield@picklerwealthadvisors.com

O: 901.316.0160, Ext. 1158

www.PicklerWealthAdvisors.com/Shelby

Robin Winsett

Client Services Administrator

rwinsett@picklerwealthadvisors.com

O: 901.316.0160, Ext. 1162

www.PicklerWealthAdvisors.com/Robin

MEET THE PWA TEAM

Kelly Childress

Client Services Administrator

kchildress@picklerwealthadvisors.com

O: 901.316.0160, Ext. 1171

www.PicklerWealthAdvisors.com/Kelly

Cort Winsett, Esq.

Sr. Director of Operations

cwinsett@picklerwealthadvisors.com

O: 901.316.0160, Ext. 1167

www.PicklerWealthAdvisors.com/Cort

Cameron Spann

Chief Branding Officer

cspann@picklerwealthadvisors.com

O: 901.316.0160, Ext. 1155

www.PicklerWealthAdvisors.com/Cameron

Nicole Ellis

Marketing Specialist

nellis@picklerwealthadvisors.com

O: 901.316.0160, Ext. 1170

www.PicklerWealthAdvisors.com/Nicole

Luke Murrah

Financial Planning Coordinator

lmurrah@picklerwealthadvisors.com

O: 901.316.0160, Ext. 1153

www.PicklerWealthAdvisors.com/Luke

Jordan Hays

Receptionist

jhays@picklerwealthadvisors.com

O: 901.316.0160

www.PicklerWealthAdvisors.com/Jordan

The Pickler Law Firm

The Pickler Law Firm is dedicated to providing outstanding legal advocacy and superior client service, and was founded on the principles of advisory excellence. Our experienced professionals specialize in estate planning, estate administration and probate, business formation, business succession planning, and wills and trusts.

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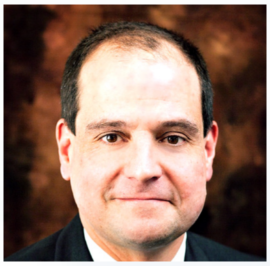
David A. Pickler, Esq.
President & Attorney
dpickler@picklerlaw.com
O: 901.244.4242
C: 901.494.5821

Jon Long, Esq.
Attorney at Law
jlong@picklerlaw.com
O: 901.244.4242



Cortland Winsett, Esq.
General Counsel
cwinsett@picklerlaw.com
O: 901.244.4242

Robert Hale, Esq.
Attorney at Law
rhale@picklerlaw.com
O: 901.244.4242

Donna Johnson
Legal Assistant
djohnson@picklerlaw.com
O: 901.244.4242

Kelsey Nigh
Paralegal
knigh@picklerlaw.com
O: 901.244.4242

www.picklerlaw.com

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David A. Pickler
Co-Founder
dpickler@picklerwealth.com
O: 901.244.4242
C: 901.494.5821

Kin Campbell, CPA
Managing Partner
kin@campbellcpa.com
O: 901.244.4242

Charles Cossar, CPA
Office Manager
ccossar@picklerwealth.com
O: 901.244.4242

Gracie Fuller, CPA
Accountant
gfuller@pickleraccountingadvisors.com
O: 901.244.4242

Marie Henderson
Sr. Accountant
mhenderson@pickleraccountingadvisors.com
O: 901.244.4242

Jeannene Bradley
Bookkeeper
jbradley@pickleraccountingadvisors.com
O: 901.244.4242

Sarah Fowler
Bookkeeper
sfowler@pickleraccountingadvisors.com
O: 901.244.4242

Alyssa Gonzalez
Bookkeeper
bookkeeping@pickleraccountingadvisors.com
O: 901.244.4242

Cara Campbell
Receptionist (Collierville)
ccampbell@picklercompanies.com
O: 901.244.4242

Ladonna Woodall
Receptionist (Russellville)
arkstaff@pickleraccountingadvisors.com
O: 901.244.4242

www.pickleraccounting.com

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Katie Pickler

Owner, Event Planner

picklerevents@gmail.com

O: 901.485.3132

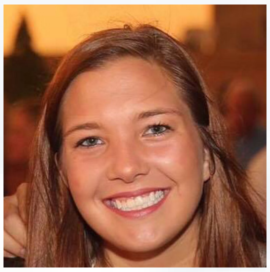
www.PicklerEvents.com

Beth Pickler

Event Coordinator

O: 901.485.3132

www.PicklerEvents.com



Hannah Williams

Event Assistant

O: 901.485.3132

www.PicklerEvents.com

Katie Callahan

Event Assistant

O: 901.485.3132

www.PicklerEvents.com

www.picklerevents.com

Pickler Events and Commonwealth Financial Network are separate and unrelated entities.

CONTACT US

Pickler Wealth Advisors
1135 Halle Park Circle
Collierville, TN 38017

T: 901.316.0160
F: 901.316.0155

www.PicklerWealthAdvisors.com
www.TheBullNetwork.com

David Pickler
DPickler@picklerwealthadvisors.com
Receptionist
JHays@picklerwealthadvisors.com
General Inquiry
Info@picklerwealthadvisors.com

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www.picklerwealthadvisors.com | 901.316.0160 | JHays@picklerwealthadvisors.com | 1135 Halle Park Circle | Collierville, TN 38017